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## Department of Finance BCP Form Submission Instructions

### Forms DF-46 and DF-151

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Department of Finance (Finance) forms DF-46 and DF-151 are the official forms used by departments to submit budget change proposals (BCP) to Finance for review and approval. DF-46 is the primary form used by most departments; however, DF-151 is used by departments who submit BCPs that are Capital Outlay related. Both forms meet WCAG 2.0 accessibility standards and are located on Finance's public website at [http://www.dof.ca.gov/budget/resources\\_for\\_departments/budget\\_forms/index.html](http://www.dof.ca.gov/budget/resources_for_departments/budget_forms/index.html).

#### **DF-46 and DF-151 Verification and Certification Responsibility**

Departments are responsible for verifying and certifying BCP Microsoft Word (Word) documents submitted to Finance pass the web accessibility check in Word and/or meet web content accessibility guidelines (WCAG 2.0). The following steps facilitate the process for verifying, certifying, and saving BCP documents:

#### **BCP Document Check and Verification**

Prior to submitting the BCP to Finance's Budget Analyst, perform the following steps:

1. Confirm that the word document file has the **\*.docx** extension, **not \*.doc as this file format is invalid**.
2. Use the **"Accessibility Checker"** in Word to check for errors, warnings, tips, and accessibility checker limitations. The Accessibility Checker verifies your file against a set of rules that identify possible issues for people who have disabilities. Depending on how severe the issue is, the Accessibility Checker classifies each issue as an error and/or warning, and then provides a tip, why fix, or how to fix the errors.
  - a. **Errors** - If content in the file makes it very difficult or impossible for someone with a disability to use, the Accessibility Checker classifies it as an error.
  - b. **Warnings** - If the content in most (but not necessarily all) cases is difficult for people with disabilities to understand, the Accessibility Checker gives a warning.
  - c. **Tips** - When there is content that people with disabilities can understand but that could be better organized or could be presented in a way that can improve their experience, you see a tip.
    - i. *Example: skipping from a first-level heading to a third-level heading.*
  - d. Clicking an item in the results highlights the corresponding item in the document and displays the **Additional Information** section:
    - i. **Why Fix**: explains why the issue impacts accessibility.
    - ii. **How to Fix**: provides suggestions for repairing the issue.

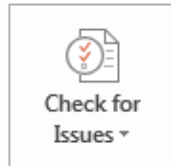
**Accessibility Checker Limitations** -There are some accessibility issues the Accessibility Checker is not able to detect. Also, some issues listed in the Accessibility Checker findings are not necessarily accessibility issues that need to be fixed.



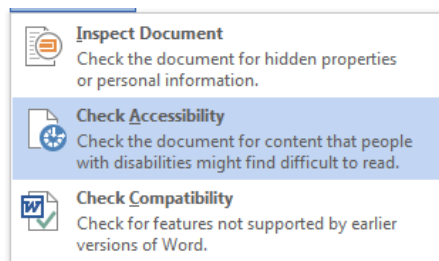
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### **Performing an Accessibility Check in Word**

1. On the ribbon, select the **File** tab.
2. Select the “**Check for Issues**” button.



3. Click on “**Check Accessibility.**”



4. The Inspection Results will display a list of errors or warnings identified in the document on a side panel on the right side of the screen.
5. **Click** on an item in the list to go to the error identified in the document.
6. Correct the error. When corrected, the error will be cleared from the Inspection Results list.
7. Repeat this action for each error detected.

### **Saving the BCP Document**

All BCP Word documents must be saved using the **\*.docx** file extension. DOF-46 and DOF-151 templates are currently saved using the \*.docx extension, therefore refrain from saving it using the \*.doc file extension as it will render the document invalid and it will fail to meet web accessibility standards.

### **Inserting Tables in BCP Word Documents**

Tables can be inserted in a Word BCP document; however, they should meet and/or pass accessibility standards.

Using a keyboard, users should be able to tab smoothly through the table, cell by cell and row by row. A screen reader should be able to navigate the table in a logical reading order starting from left to right.

Tables must not contain vertical columns and/or horizontal rows in which cells are merged. A common stumbling block for accessible tables are split cells, where two cells occupy the space of a single cell.

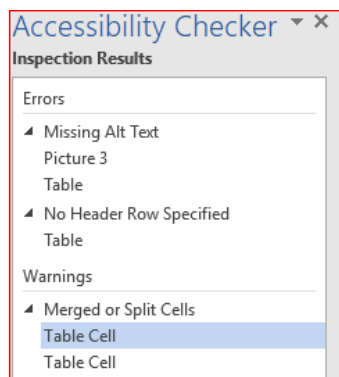
Below is an example of a table that is invalid. Both the top row and first column cells have been merged, and a split cell is displayed in row 2. This table does not meet accessibility standards.



THIS TABLE HEADER ROW CONSISTS OF 4 MERGED COLUMNS (INVALID)				
This table column consists of 4 merged rows (Invalid)	Split	Cell		
			This is	A
			Nested	Table
			(INVALID)	

### Accessibility Checker Inspection Results

When running the Accessibility Checker in Word, the following errors and warnings will be displayed in the Inspection Results based on the table structure in the example above.

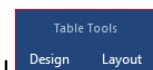


In order for a table to pass an accessibility check, **the table must be in its simplest form** and should not contain nested tables (table within a table), split cells, or merged cells as these can impact screen-reading programs.

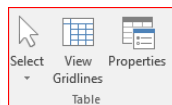
### Table Header Row

All tables must have a designated table row header. To check whether a table row header has been designated, perform the following steps:

1. Select the table and click **“Layout”** on the Table Tools menu



2. Select **“Properties”** on the ribbon



3. The **“Table Properties”** box will be displayed (see below).
4. From the **“Row”** tab, make sure the **“Repeat as header row at the top of each page”** has a checkmark and the **“Allow row to break across pages”** is not checked.

The image shows the "Table Properties" dialog box with the "Rows" tab selected. The "Size" section has "Specify height" checked, with a value of "0" and a "Row height is" dropdown set to "At least". The "Options" section has "Allow row to break across pages" unchecked and "Repeat as header row at the top of each page" checked. There are "Previous Row" and "Next Row" buttons. The "OK" and "Cancel" buttons are at the bottom right.

5. Click on the **"Alt Text"** tab to add Title text and a Description of the table (see below) if it does not exist.

The image shows the "Table Properties" dialog box with the "Alt Text" tab selected. The "Title" field contains the text "Additional BCP information." The "Description" field contains a detailed paragraph about legislation and information technology components. The "Alternative Text" section contains explanatory text about the purpose of titles and descriptions. The "OK" and "Cancel" buttons are at the bottom right.

6. Click **"Ok"** to close the dialog box.
7. Repeat steps 1 thru 6 for all tables.

### **Inserting Charts**

Departments should refrain from inserting charts in the BCP because alternative text may not be able to accurately convey what the content represents on the X or Y axis of the chart. The W3C website which specializes in providing web accessibility tutorials is highly recommended as a reference tool for addressing complex images (<https://www.w3.org/WAI/tutorials/images/complex/>).

### **Inserting Org Charts**

Departments should refrain from inserting Org Charts as an image in the BCP because it is difficult and challenging to translate the organizational hierarchy, interpret the image, or add meaning for persons using assistive technology devices. Using **"Alt Text"** to describe each layer of the Org Chart is an arduous task and more than likely will still fall short of describing the hierarchal structure. Creating a text-based



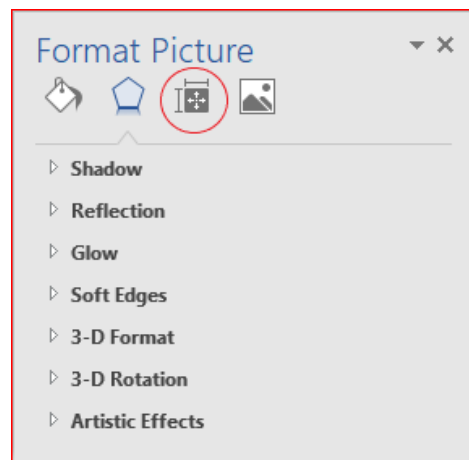
version that displays the org chart in a text-list format will meet ADA compliancy. Utilizing this format will convey the chart's hierarchal structure when using assistive technology such as a screen reader. However, if the org chart is quite large, this may not be a viable option as the number of pages using this approach will increase in the BCP.

Although translating the organizational hierarchy of an org chart is challenging, including a scaled down text-based version and/or segment of the hierarchical structure that specifically pertains to the BCP will make this a less arduous task.

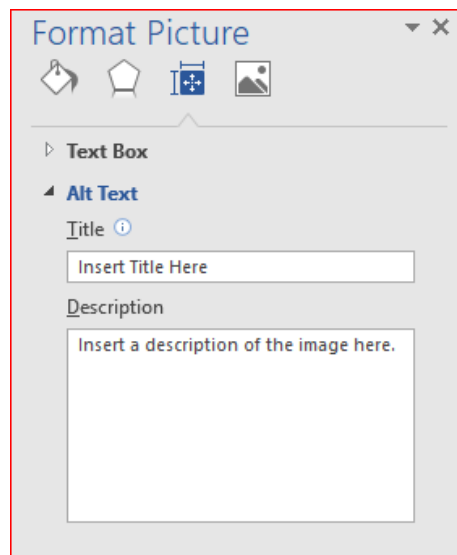
### Inserting Images

Departments must ensure that all images inserted into the BCP must contain "**Alt Text**" that provides a meaningful description of the image. To add "**Alt Text**" to an image, perform the following steps:

1. **Right-click** on the image.
2. Select "**Format**" from the shortcut menu. The "**Format Picture**" pane will be displayed.



3. Select the "**Layout and Properties**" icon (circled in the picture above).
4. Click on "**Alt Text**" (see below).





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5. Enter the **"Title"** of the image and the **"Description"**.
  6. Click on the **"X"** to close the **Format Picture** pane.
  7. Repeat steps 1 thru 6 for all images.

For additional information regarding the content contained herein, please email Finance's [webmaster](#).